ZERODELAY

Ironleaf Plumbing & Air

90-Day ZeroDelay Plan

Prepared for FICTIONAL DEMONSTRATION — Ironleaf Plumbing & Air

August 23, 2026

EXECUTIVE BRIEFING

What You Need to Know First

WHAT WE FOUND

FICTIONAL DEMONSTRATION REPORT — Ironleaf Plumbing & Air is a fictional business created solely to demonstrate the analytical depth and structure of a ZeroDelay plan. All company, financial, operational, and market data in this report are illustrative and do not represent a real customer or real business.

SITUATION

Ironleaf Plumbing & Air is an established, 8-year owner-operated residential trade company operating in the Greater Gulf Coast Region with approximately $2.6M in annual revenue, a strong referral network, and a loyal customer base of 450 active accounts. The business is profitable at a 14% operating margin with a 12-person team handling both plumbing and HVAC/air services. However, diagnostic analysis identified $184,000 in annual revenue currently available within the existing estimate pipeline and customer base that is not being systematically captured.

CENTRAL FINDING

The primary revenue constraint is unconverted estimates: Ironleaf writes approximately 70 estimates per month at a 42% close rate, meaning 41 estimates per month — representing $52,193 in potential monthly revenue — are never converted. Structured 3-touch follow-up in comparable residential service businesses demonstrates close rates of 52% to 60% (demonstration benchmark). Closing just 7 additional estimates per month at the current $1,273 average job value recovers $106,932 in annual revenue without a single additional marketing dollar.

WHAT THIS MEANS

This is a revenue recovery problem, not a growth problem. The demand is arriving; the business has the capacity to serve it; the gap is operational — no systematic follow-up process exists. The first 30 days of this plan require no new marketing spend, no new hires, and no technology investment. They require only a scripted follow-up process and the discipline to run it.

OUR RECOMMENDATION

Execute a three-priority sequence: (1) deploy a structured estimate follow-up system in week 1, (2) update the price book at day 31 starting with the highest-volume service categories, and (3) launch a $149/year Care Plan membership offer at day 61 targeting the most engaged existing customers. These are sequenced by implementation confidence and operational complexity — each priority builds the infrastructure the next one requires.

EXPECTED IMPACT

Conservative scenario (Priority 1 alone, partial execution): +$53,466/year. Base scenario (Priorities 1 + 2 fully executed): +$160,932/year. Full execution (all three priorities fully executed): +$184,536/year by month 9. These are illustrative scenarios based on fictional diagnostic inputs — not guarantees.

DECISION REQUIRED THIS WEEK

This week: write a 3-step follow-up script for unconverted estimates, pull every open estimate from the past 30 days, and make the first follow-up call. No system change or capital commitment is required. The only input is time — approximately 30 minutes per day for two weeks to test whether structured follow-up changes the close rate before committing to a CRM purchase.

Primary constraint: conversion rate · Revenue problem: Yes · Cost problem: No · Diagnosis confidence: HIGH

Primary constraint (estimate close rate) is directly observable from internal estimate logs and job completion records — no external research required. Secondary constraint (price erosion) is confirmed by the stated absence of a systematic price book review in 2+ years.

STOP DOING THIS — STRATEGIC CORRECTIONS

-- Stop relying on single-call follow-up for open estimates

Why: The current practice of making one follow-up attempt — or relying on the owner's memory to revisit open estimates — is producing a 42% close rate when structured-follow-up businesses in residential trades demonstrate 52% to 60% close rates (demonstration benchmark). Every estimate written represents a $1,273 average revenue asset sitting in an unmanaged pipeline. The 41 estimates abandoned each month represent $52,193 in potential monthly revenue that the business has already partly paid for through technician dispatch and overhead. A documented 3-touch process eliminates this leak.

Reconsider when: You have sustained a 52%+ close rate for 8 consecutive weeks and each estimate already receives 3 documented contact attempts before being closed out.

-- Stop discounting service pricing to win competitive quotes

Why: Ironleaf's referral-heavy customer acquisition — where 60%+ of revenue originates from existing customer relationships — indicates that the business already wins on trust, reputation, and relationship quality. Discounting to compete against lower-cost alternatives commoditizes a differentiated service, attracts price-sensitive customers who are the least likely to become membership members or referral sources, and sets a precedent that makes the price book update (Priority 2) structurally harder to implement.

Reconsider when: A documented win/loss analysis across 20+ lost estimates shows that price — not relationship, response time, or perceived quality — is the primary stated reason in >30% of cases.

-- Stop routing all pricing exceptions and escalated calls through the owner

Why: At 60 hours per week of owner time, every pricing exception or dispatch escalation that routes through the owner extends decision-making time, reduces per-technician autonomy, and prevents the owner from doing the strategic work (price book review, membership design, hiring pipeline) that this plan requires. The current practice confirms to the team that they are not trusted to make judgment calls — which will limit scaling permanently.

Reconsider when: A tiered pricing authority matrix is documented, deployed, and has been in use for 60 days without a material increase in discount frequency or customer complaint rate.

How This Business Is Classified

P Performance-Driven Operator

You run a profitable, established business with real competitive assets — a loyal referral base, operational tenure, and a capable team. The primary opportunity is closing the gap between your current execution and your operational potential. This business does not need transformation; it needs discipline, systems, and structured follow-through.

FINANCIAL PERFORMANCE 65/100

ORGANIZATIONAL HEALTH 58/100

BUSINESS DNA

Owner-operated residential trade business with 8 years of Gulf Coast market tenure and a strong referral network built on consistent service quality. Revenue generation is referral-driven with low paid-advertising dependency. Core operational risk is owner concentration — critical decisions route through a single decision-maker at high weekly hours. Growth potential is primarily within the existing pipeline and customer base before new market entry is required.

Growth: Measured — prioritize margin and operational stability over aggressive expansion · Style: Owner-centric — key decisions route through founder; delegation infrastructure underdeveloped · Owner: Practitioner-operator — technically expert, customer-focused, and operationally involved · Model: Transaction-plus-maintenance — core revenue transactional with growing membership opportunity · Risk tolerance: Conservative — prefers proven approaches with visible metrics before committing

SEVEN-DIMENSION BUSINESS SCORECARD

Sales Foundation	48
Marketing Visibility	71
Financial Health	65
Operational Efficiency	58
Customer Experience	82
Team & Leadership	61
Strategic Clarity	45

REVENUE ANALYSIS

Where the Money Is Being Left Behind

These gaps were calculated from your diagnostic answers before the plan was written. Each represents revenue you are currently not capturing. Priorities 1–3 are chosen to close the highest-value gaps first.

CURRENT ANNUAL REVENUE	TOTAL UNREALIZED OPPORTUNITY	GAPS IDENTIFIED
$2,598,000	**$184,536**	**3**

Revenue Gap	Annual Value	Difficulty	Time to Capture
Estimate Conversion Gap	**$106,932**	**Low**	30–60 days
Price Book Erosion	**$54,000**	**Medium**	45–90 days
Membership & Repeat Revenue	**$23,604**	**Medium**	60–90 days

FASTEST WIN (UNDER 30 DAYS)

Estimate Follow-Up Process

LEVER SENSITIVITY — WHICH VARIABLE MOVES THE NEEDLE MOST?

Each lever is tested independently against the same baseline — impacts are not additive and must not be summed.

Lever	Modeled Change	+Monthly	+Annual	Confidence
Estimate Close Rate	+10 percentage points (42% to 52%)	$8,911	$106,932	HIGH
Conservative estimate. Structured follow-up businesses in comparable residential trades demonstrate 52% to 60% close rates (demonstration benchmark). 42% to 52% improvement (10pp) modeled; actual results may vary. Illustrative scenario — not a guarantee.				
Average Job Value	+7.6% per job value (current avg $1,273 to target $1,370, full job volume)	$16,490	$197,880	MEDIUM
Requires full price book audit and disciplined rollout across all technicians. Impact is highest of any single lever but has the most organizational complexity. Phased rollout (high-volume services first) reduces risk. Illustrative scenario — not a guarantee.				
Repeat Customer Reactivation	+8pp repeat rate on 450 active customers	$5,729	$68,748	MEDIUM
Improvement requires CRM or re-engagement campaign. High confidence in customer willingness (52% already return); medium confidence in the 8pp improvement rate. Illustrative scenario — not a guarantee.				

Lever	Modeled Change	+Monthly	+Annual	Confidence
Membership Penetration	+54 new members x $149/year	$671	$8,046	HIGH
Recurring impact is modest in year 1 but compounds annually. Priority value is predictable revenue base and reduced seasonality, not absolute impact. Illustrative scenario.				
Tech Dispatch Utilization	+8pp utilization on 7 techs	$12,990	$155,880	LOW
Highest absolute lever but requires field service management software, dispatcher empowerment, and owner delegation — the highest organizational complexity of any lever. Not recommended until Priority 3 infrastructure is in place. Illustrative scenario.				

REVENUE SCENARIOS — MODELED, NOT GUARANTEED

Each scenario layers the explicitly stated priorities onto the same current baseline. Scenarios are illustrative and are not guarantees.

CURRENT
$216,500/mo
$2,598,000/yr run rate
Today's baseline

CONSERVATIVE
+$4,456/mo
$2,651,466/yr
Priority 1 only (estimate follow-up), 42% to 47% close rate improvement (approximately 3 to 4 additional closes per month on average). No price book changes. No membership growth. Illustrative — not a guarantee.

BASE CASE
+$13,411/mo
$2,758,932/yr
Priority 1 (full 42% to 52% close rate improvement, 7 additional closes per month) plus Priority 2 (top 10 highest-volume service categories, 150 applicable jobs/month × $30/job average realized ticket improvement = $4,500/month). No membership contribution. Illustrative — not a guarantee.

UPSIDE
+$15,378/mo
$2,782,536/yr run rate
All three priorities fully executed: close rate to 52%, full price book update, and 90 active memberships. Requires 9 to 12 months for full compounding. Illustrative — not a guarantee.

Financial Diagnosis

SYMPTOM

Revenue plateau at $2.6M annual despite strong referral volume, high customer satisfaction, and 12-person operational capacity — suggesting a structural leakage problem rather than a demand deficit.

ROOT CAUSE

Systematic revenue leakage from three sources: (1) unworked estimates — 42% close rate means 41 estimate opportunities/month are abandoned without structured follow-up; (2) price book erosion — service pricing has not been systematically reviewed in 2+ years while labor and materials costs have increased, compressing blended gross margin to 38%; and (3) unconverted membership opportunity — only 8% of the 450-customer base holds a Care Plan membership, leaving recurring revenue and member-sourced service revenue significantly below potential.

PRIMARY CONSTRAINT	ANNUAL OPPORTUNITY COST	MODELED MONTHLY REVENUE OPPORTUNITY
conversion rate	**$184,536**	**$15,378**

What this means: Conversion Rate — leads are not becoming clients

Diagnosis confidence: HIGH — Primary constraint (estimate close rate) is directly observable from internal estimate logs and job completion records — no external research required. Secondary constraint (price erosion) is confirmed by the stated absence of a systematic price book review in 2+ years.

Business Health Score

62

out of 100

HOW YOUR SCORE WAS CALCULATED

Sales Foundation **+48**
Low close rate (42%) is primary drag; strong referral channel partially compensates

Marketing Visibility **+71**
Referral-heavy model and organic demand are healthy; no paid dependency creates resilience

Financial Health **+65**
Profitable at 14% EBITDA; margin watch on blended 38% gross; no major debt risk

Operational Efficiency **+58**
Owner bottleneck and ad hoc dispatch reduce efficiency score; team is capable but underled

Customer Experience **+82**
52% repeat rate and referral-driven growth reflect strong customer satisfaction

Team & Leadership **+61**
12-person team is experienced; delegation and documentation gaps limit leadership score

Strategic Clarity **+45**
No documented 90-day operating plan; priorities are owner-intuition driven, not systematic

YOUR STRENGTHS

- Strong referral network generating 60%+ of monthly revenue from established customer relationships
- 8-year operational track record with consistent residential service delivery across plumbing and HVAC
- 12-person team including 7 experienced field technicians with deep trade knowledge
- High customer satisfaction reflected in a 52% return rate within 18 months — a strong repeat-customer signal in this demonstration scenario
- Low customer acquisition cost relative to lifetime value: estimated $140 CAC against $4,074 LTV (29x ratio)

PRIORITY 1

Deploy a Structured Estimate Follow-Up System

STATUS: NOW · URGENCY: P1

SYMPTOM

Ironleaf writes approximately 70 estimates per month and converts 42% — leaving 41 estimates per month uncontacted or abandoned after a single call. At $1,273 average job value, those 41 unconverted estimates represent $52,193 in potential monthly revenue that was never pursued. There is no documented 3-touch follow-up process. Estimates are tracked informally, if at all, and follow-up depends entirely on owner memory.

WHY THIS MATTERS

Comparable residential service businesses with structured 3-touch follow-up have demonstrated 52% to 60% close rates (demonstration benchmark). Closing 7 additional estimates per month — moving from 29 to 36 monthly closes on the estimate pipeline — adds $106,932 annually without a single additional lead, new employee, or marketing dollar. This is the fastest, lowest-cost revenue lever. (All figures illustrative — based on fictional diagnostic inputs.)

THE FINANCIAL CASE

CONSERVATIVE	EXPECTED	BEST CASE
$4,456/month additional (42% to 47% close rate improvement, approximately 3 to 4 additional closes per month on average: 70 estimates × 5pp delta = 3.5 modeled closes × $1,273 avg job = $4,455.50/month rounded to $4,456) = $53,466/year	**$8,911/month additional (42% to 52% close rate improvement, 7 additional closes × $1,273 avg job) = $106,932/year**	**$12,475/month additional if close rate reaches 56% on actively managed estimates (approximately 10 additional closes per month on average: 70 × 14pp = 9.8 modeled closes × $1,273 = $12,475.40/month rounded to $12,475) = $149,705/year**

Assumption: 70 estimates written per month. Improvement modeled as additional closes at the current $1,273 average job value. Revenue from existing pipeline with no new marketing spend. Illustrative scenario — not a guarantee.

YOUR 90-DAY GOAL

Close rate on written estimates improves from 42% to 52% or higher. A documented, trackable 3-touch follow-up sequence is operational for 100% of new estimates written. Every open estimate older than 7 days has a logged contact attempt.

WEEK 1 ACTIONS

1. Write a 3-step follow-up script: Day 2 phone call, Day 7 phone call, Day 14 text + email

2. Pull all open estimates from the past 30 days and call every one using the Day 2 script
3. Create a simple tracking log (spreadsheet or whiteboard) that shows each estimate, date written, contact attempts, and status (open / won / lost)
4. Designate one person — owner or office manager — as the daily estimate follow-up owner

YOU WILL KNOW IT IS WORKING WHEN

Close rate on written estimates of at least 52% by week 8, measured weekly. 100% of new estimates receive at least 2 documented contact attempts before being marked lost.

STRATEGIC PERSPECTIVES — ADVISORY PANEL DEBATE

REVENUE RECOVERY VIEW

The highest-confidence and fastest return is the estimate follow-up system. Every unconverted estimate represents sunk cost — the technician drove out, the estimate was written, the overhead was incurred. Recovering 7 additional closes per month at zero incremental acquisition cost generates $106,932 annually from resources already deployed. The process is simple enough to test in 2 weeks without software, capital, or new hires. If it works, the result is the fastest, cheapest revenue improvement available to this business.

"7 additional closes/month at $1,273 avg = $106,932/year at zero incremental acquisition cost"

MARGIN IMPROVEMENT VIEW

Revenue growth without margin improvement creates the illusion of progress. At 38% blended gross margin with a price book frozen for 2+ years, Ironleaf may be delivering measurably more service value than it is capturing in pricing. A systematic price book update applies to every one of the 170 jobs already being completed — it improves the economics of the entire existing business, not just the marginal estimates. Pricing discipline still matters because it improves economics across existing service volume without requiring additional leads. Under the modeled expected case, repricing the top 10 categories adds approximately $4,500/month; the full-book best case reaches $8,500/month. This makes pricing a high-value second priority after estimate recovery, not a replacement for Priority 1.

"150 applicable jobs/month × $30 average realized improvement = $4,500/month"

SYSTEMS DURABILITY VIEW

Both the estimate follow-up improvement and the price book update will erode within 12–18 months unless the operating infrastructure changes. The estimate follow-up fails today because no system tracks and routes unpursued estimates. Pricing deteriorates because no mechanism enforces standards across 7 technicians with an owner approving exceptions at 60+ hours/week. Investing in a field service management platform and delegating dispatch authority in parallel to the quick wins is the durable path — the short-term wins pay for the infrastructure that makes them permanent.

"Owner at 60+ hr/week is the binding constraint; all other improvements are temporary without delegation infrastructure and a documented decision-authority framework"

RECURRING REVENUE VIEW

One strategic move Ironleaf has not yet operationalized is a structured membership program. Ironleaf's 450-customer base and 52% repeat rate represent an exceptional foundation for a Care Plan that creates switching costs, smooths seasonal cash flow, and generates predictable revenue that supports planning. Starting enrollment early — even before the operations are fully stabilized — builds the member base while the short-term improvements are compounding. A competitor with a stronger recurring-membership proposition could create greater retention and switching friction in this demonstration scenario.

"90 members at $149/year = $13,410 recurring base that grows annually without proportional sales effort; members also convert service upsells at materially higher rates"

WHERE ALL PERSPECTIVES AGREE

All four perspectives are correct about their primary lever — the disagreement is about sequencing, not about which levers are real. Priority 1 (estimate follow-up) and Priority 2 (price book) are sequenced correctly: they address the highest-confidence, lowest-complexity revenue gaps first and generate the cash flow needed to fund the infrastructure improvements that Priority 3 requires.

THE DECIDING QUESTION FOR YOUR SITUATION

The 42% estimate close rate is the highest-confidence constraint because it is directly observable from internal estimate records and requires no external research or capital to test. Structured follow-up is also the fastest lever — results visible in 30 days — making it the correct starting point even if the long-term leverage of pricing improvement is larger.

OUR VERDICT

Activate Priority 1 in week 1 with a scripted 3-touch follow-up sequence. Run for 30 days. Measure results. Begin Priority 2 price code audit at day 14 in parallel. Launch Priority 3 membership enrollment at day 61. Do not wait for Priority 1 to be 'perfect' before starting Priority 2 preparation — the data from Priority 1's first 14 days is sufficient to inform it.

EVIDENCE BASE

42% estimate close rate (fictional diagnostic input)

Demonstration data — fictional scenario

Implication: 10 to 18 percentage point gap below typical rates for comparable structured-follow-up businesses (demonstration comparison)

Single follow-up call is current standard; no documented multi-touch process

Demonstration data — fictional scenario

Implication: Process-level root cause identified — this is a system absence, not a lead quality problem

52% customer repeat rate within 18 months

Demonstration data — fictional scenario

Implication: Customers trust Ironleaf — unconverted estimates are not a trust problem; they are a follow-up process problem

KPI SCORECARD

Metric	Now	30 days	90 days	How to Measure	Frequency
Estimate close rate	42%	46%	52%	Total jobs completed from estimates ÷ total estimates written (tracked weekly)	Weekly
Follow-up contact rate	~30% (estimated)	80%	100%	Estimates with at least 1 logged follow-up contact divided by total open estimates	Weekly
Estimate pipeline age	Untracked	Tracked	No open estimate > 14 days without 3 contact attempts	Estimate log reviewed at weekly team meeting	Weekly

PRIORITY RISK REGISTER

Risk	Probability	Warning Sign	Contingency
Customers decline or are unreachable	**Medium**	>40% of follow-up calls go to voicemail with no callback after 3 attempts	Add a text/email channel to the Day 7 and Day 14 touchpoints; test callback rates by channel
Office bandwidth is insufficient for daily follow-up calls	**Medium**	Office manager reports >30 minutes/day consumed by follow-up calls in the first 2 weeks	Reduce scope to the 20 highest-value open estimates; prioritize by estimate amount

PRIORITY 2

Audit and Update the Price Book for High-Volume Services

STATUS: NEXT · URGENCY: P2

SYMPTOM

Ironleaf's price book has not been systematically reviewed in 2+ years. During that period, materials costs, fuel, and technician labor costs have increased — compressing blended gross margin to 38%. The company does not have a documented minimum service economics model — no floor price below which technicians are not authorized to accept work. Discounting happens on an ad hoc basis, routed through the owner, with no consistent standards or tracking.

WHY THIS MATTERS

Three tiers of price book improvement are modeled for this fictional demonstration scenario: a partial update covering the top 5 highest-volume categories (100 applicable jobs/month × $20/job) = $2,000/month; the expected case covering the top 10 categories (150 applicable jobs/month × $30/job) = $4,500/month; and a full-book best case (170 applicable jobs/month × $50/job) = $8,500/month. Margin improvement is permanent: unlike the estimate follow-up lever, correct pricing applies to every job indefinitely without ongoing effort. (All figures illustrative — fictional inputs.)

THE FINANCIAL CASE

CONSERVATIVE	EXPECTED	BEST CASE
$2,000/month additional (top 5 highest-volume service categories, 100 applicable jobs/ month x $20/job average realized ticket improvement) = $24,000/year	**$4,500/month additional (top 10 highest-volume service categories, 150 applicable jobs/ month x $30/job average realized ticket improvement) = $54,000/year**	**$8,500/month additional (full 170-job monthly volume at $50/job average realized ticket improvement across all repriced service categories, with minimum-margin floor enforced) = $102,000/ year**

Assumption: Conservative: 100 applicable jobs/month x $20 avg ticket improvement. Expected: 150 applicable jobs/month x $30 avg ticket improvement. Best case: full 170-job volume x $50 avg ticket improvement. Demonstration assumptions only — not a guarantee.

YOUR 90-DAY GOAL

Price book updated for the top 10 highest-volume service categories. A tiered discount authority matrix is documented and communicated to all technicians. Owner is no longer the sole approval point for pricing exceptions. Blended gross margin is tracking at 40%+ by end of month 3.

WEEK 1 ACTIONS

1. Pull a list of the 20 most frequently invoiced service codes from the last 6 months and rank by job count
2. For each of the top 5 service codes, calculate the current parts + labor cost and compare to the current quoted price — document the margin on each
3. Research current wholesale parts cost for the 3 most common materials used in each service code
4. Schedule a 2-hour owner working session to review findings and set new prices for the top 5 codes

YOU WILL KNOW IT IS WORKING WHEN

Blended gross margin of at least 40% by month 3, measured monthly from invoicing software. Top 10 service codes have been reviewed and updated. Discount request rate routed to owner no more than 2 per week (down from current ad hoc).

EVIDENCE BASE

Price book last updated 2+ years ago (fictional diagnostic input)

Demonstration data — fictional scenario

Implication: Materials and labor cost increases over 24+ months have not been passed through to customers

38% blended gross margin vs. 45% plumbing-specific and 31% HVAC-specific

Demonstration data — fictional scenario

Implication: Margin gap between services indicates an opportunity to shift service mix in addition to repricing

Pricing exceptions routed through owner on ad hoc basis

Demonstration data — fictional scenario

Implication: No standards exist — discount discipline is absent and cannot be enforced at scale

KPI SCORECARD

Metric	Now	30 days	90 days	How to Measure	Frequency
Blended gross margin	38%	38.5%	40%	Monthly: (Revenue - Direct Labor - Parts) / Revenue from invoicing summary	Monthly
Average job value	$1,273	$1,300	$1,350	Total monthly revenue ÷ total jobs invoiced	Monthly
Pricing exceptions to owner	Untracked	Tracked	no more than 2/week	Logged discount requests in authority matrix log	Weekly

PRIORITY RISK REGISTER

Risk	Probability	Warning Sign	Contingency
Price increase triggers customer pushback on competitive quotes	Low	>10% of lost quotes cite price as the primary stated objection post-update	Isolate the repriced service codes; track close rate before and after separately; roll back individual service codes if close rate drops >8pp

Risk	Probability	Warning Sign	Contingency
Technicians resist new pricing standards or continue applying informal discounts	**Medium**	Invoice amounts on repriced services are not increasing 30 days after rollout	Weekly price compliance review; tie discount authority explicitly to tech seniority tier

PRIORITY 3

Launch a $149/Year Care Plan Membership to Build Recurring Revenue

STATUS: LATER · URGENCY: P3

SYMPTOM

Ironleaf currently has 36 active memberships at $149/year (8% penetration of 450 active customers), generating $5,364 annually in recurring revenue. The company has no systematic enrollment process — memberships are sold opportunistically during service calls rather than through a defined offer, a defined audience, or a defined enrollment cadence. The seasonal revenue variance from HVAC demand creates cash flow unpredictability that a recurring base of 90+ members would meaningfully reduce.

WHY THIS MATTERS

Growing from 36 to 90 active members (20% penetration) generates $13,410/year in total recurring membership revenue ($8,046/year incremental from 54 new members), reduces seasonal cash flow variance, and creates customer lock-in that increases repeat business rate from the membership base. More importantly, members are the highest-converting audience for service upsells — a member who calls for an annual HVAC maintenance visit is significantly more likely to accept a plumbing assessment recommendation than a cold-call customer. (All figures illustrative — fictional inputs.)

THE FINANCIAL CASE

CONSERVATIVE	EXPECTED	BEST CASE
$671/month incremental membership fee revenue (54 new members × $149/year ÷ 12 months) — modest absolute monthly impact but compounding annually without additional sales effort	**About $1,967/month total Priority 3 opportunity: incremental membership fees (54 new members x $149/year = $8,046/year) plus estimated incremental member-sourced service revenue ($15,558/year) = $23,604/year total.**	**About $3,059/month if 120 total Care Plan memberships are achieved (84 new members beyond the current 36): 84 new members x $149/year = $12,516/year incremental membership fees ($1,043/month) plus 84 new members x $288/year modeled member-sourced service revenue ($24,192/year = $2,016/month) = $36,708/year total.**

Assumption: Membership fee of $149/year. Priority 3 is modeled as a revenue opportunity only — incremental membership fees plus incremental member-sourced service visits. Fulfillment costs (annual HVAC tune-up, plumbing inspection) are not modeled in this revenue analysis. Illustrative scenario — not a guarantee.

YOUR 90-DAY GOAL

50 active Care Plan memberships by day 75; 90 active memberships by day 90. A documented enrollment process is in place — offer, price, benefits, enrollment script, and renewal reminder sequence. Active membership count and enrollment conversion are tracked during the 90-day plan; first-year renewal measurement begins in month 13.

WEEK 1 ACTIONS

1. **READY TO USE**

   Define the Care Plan offer: what does the $149/year include? (Recommended: annual HVAC tune-up, annual plumbing inspection, priority dispatch, 10% discount on unplanned service calls during active membership)

2. **READY TO USE**

   Identify the 60 most engaged existing customers (most recent service date + highest lifetime spend) as the first pilot cohort — these are highest-probability buyers. Note: reaching the 90-day enrollment target of 54 new members at a 15% modeled conversion rate requires approximately 360 total qualified offers across multiple outreach waves; the first 60-customer cohort is the pilot — measure conversion, then expand to the broader 450-customer base

3. Draft a 3-sentence membership pitch for technicians to use at the end of every service call

4. Assign one office staff member as the membership enrollment tracker

YOU WILL KNOW IT IS WORKING WHEN

90 active memberships by day 90 (from 36 to 90 = +54 new enrollments). At a 15% modeled conversion rate, approximately 360 total direct offers must be made across multiple campaign waves to reach this target (54 ÷ 0.15 = 360 required offers). Membership conversion rate of at least 15% on all direct offers tracked. First-year renewal rate tracked starting month 13.

EVIDENCE BASE

36 current memberships at 8% penetration (fictional diagnostic input)

Demonstration data — fictional scenario

Implication: Demand for the membership product exists — 36 customers purchased without a systematic process. A systematic enrollment effort has a high probability of improving penetration materially.

52% repeat customer rate within 18 months

Demonstration data — fictional scenario

Implication: High loyalty base; customers who return repeatedly are the natural membership audience

Seasonal HVAC demand creates cash flow variance

Demonstration data — fictional scenario

Implication: Recurring membership revenue is the structural solution to seasonal cash flow unpredictability

KPI SCORECARD

Metric	Now	30 days	90 days	How to Measure	Frequency
Active Care Plan memberships	36	36	90	Active membership agreements in CRM or spreadsheet tracking log	Weekly
Membership enrollment conversion rate	Not launched	Not launched	at least 15%	Enrollments ÷ direct offers made (e.g. 9 enrollments ÷ 60 offers = 15%)	Monthly
Annual recurring membership revenue	$5,364	$5,364	$13,410	Active members × $149/year (36 × $149 = $5,364 baseline; 90 × $149 = $13,410 target)	Monthly

PRIORITY RISK REGISTER

Risk	Probability	Warning Sign	Contingency
Offer is not compelling enough to drive enrollment from existing customers	**Medium**	<10% conversion on first outreach campaign to the 60 most-engaged customers	Conduct 5 direct conversations with non-enrollees to understand objections; revise the offer (consider adding a third benefit or adjusting the price point)
Membership fulfillment (annual visits) creates scheduling strain in peak season	**Medium**	Member annual visit backlog exceeds 15 pending appointments in any single week	Tier annual visit scheduling to off-peak months as a benefit of the membership; use scheduling as a demand smoothing tool rather than a reactive obligation

Implementation Roadmap

Days 1–30

Estimate Follow-Up System — Deploy, Measure, and Iterate

• Write and distribute the 3-touch estimate follow-up script to all office staff

• Create an estimate tracking log (spreadsheet minimum; CRM if available) visible to owner and office manager

• Call every open estimate from the past 30 days using the Day 2 script in week 1

• Run the 3-touch cadence on all new estimates written during the month

• Produce a weekly close rate report: total estimates written, total closes, percentage

• Begin service code audit: pull the 20 most frequently invoiced codes; calculate current margin

[+] Milestone: Estimate follow-up system fully operational. Weekly close rate measurement in place. First 30-day close rate result available for evaluation. Service code margin analysis complete for top 10 codes.

Leading indicators:

- Follow-up calls completed per week (target: all open estimates >7 days)
- Estimate pipeline age (target: no estimate >14 days without 3 contacts)

Lagging indicators:

[+] Weekly estimate close rate (target: 46% by end of month 1)

[+] Additional closes per month from follow-up vs. baseline

Revenue range: $4,456–$8,911/mo

MODELED OUTCOME — NOT A GUARANTEED FORECAST

Confidence: HIGH

Days 31–60

Price Book Update — Implement and Enforce

• Complete price review for top 10 highest-volume service codes; set new rates

• Document a tiered discount authority matrix: technician limit, office manager limit, owner required

• Communicate new rates and authority matrix to all technicians in a team meeting

• Deploy new prices in invoicing software; confirm all technicians are using updated pricing

• Begin Care Plan offer design: define what $149/year includes, draft benefits language

• Identify first 60 enrollment candidates: filter by most recent service date + highest spend

[+] Milestone: Price book updated and deployed for top 10 service categories. Tiered discount authority matrix in place and communicated. Care Plan offer designed and enrollment materials drafted.

Leading indicators:

- Number of service codes with updated prices in invoicing system
- Pricing exceptions routed to owner (target: declining trend from baseline)

Lagging indicators:

[+] Average job value (target: $1,300+ by day 60)

[+] Blended gross margin (target: 39%+ from invoicing report)

Revenue range: $8,911–$13,411/mo

MODELED OUTCOME — NOT A GUARANTEED FORECAST

Confidence: MEDIUM

Days 61–90

Membership Launch — Enroll and Activate the Recurring Revenue Base

• Wave 1 (Day 61): present the $149/year Care Plan offer to the 60 highest-probability customers (most recent service date + highest lifetime spend); target at minimum 9 enrollments (15% of 60) as proof of concept

• Measure Wave 1 conversion rate and document objections before proceeding to Wave 2

• Refine the offer language or enrollment script if Wave 1 conversion rate is below 12% before expanding to successive customer waves

• Expand enrollment offer to successive qualified customer waves from the 450-customer base; reaching 54 total new enrollments at 15% conversion requires approximately 360 qualified offers across all waves — stop and reforecast if pilot conversion materially misses 15%

• Track enrollment daily; report active member count weekly against day-75 target (50 active) and day-90 target (90 active)

• Enroll memberships in invoicing system; schedule annual visits for all new members

• Review Priority 1 and Priority 2 results; identify any lever adjustments needed before month 4

[+] Milestone: 50 active Care Plan memberships by day 75; 90 active by day 90. Enrollment process is documented and repeatable for ongoing monthly cadence. Priorities 1 and 2 are operating as standard processes — not initiatives.

Leading indicators:

- Outreach contacts made to targeted membership candidates
- Enrollment conversion rate on direct offer

Lagging indicators:

[+] Active Care Plan memberships (target: 90 by day 90)

[+] Monthly recurring membership revenue equivalent (members x $149 / 12)

Revenue range: $13,411–$15,378/mo

MODELED OUTCOME — NOT A GUARANTEED FORECAST

Confidence: MEDIUM

Plan Risk Register

These are the most likely risks to derail your 90-day plan. Review monthly and act on warning signs immediately.

Risk	Category	Probability	Impact	Warning Sign	Contingency
Owner health or absence event	Operational	Medium	Critical	Owner misses 2 or more scheduled dispatch or pricing decisions in a single week; or owner reports sustained fatigue/ burnout from >65hr/week for 3+ months	Activate pre-documented dispatch escalation protocol managed by lead dispatcher. Identify the office manager or most senior technician as interim operations lead. Document this protocol in week 1 of the plan regardless of current owner health. Note: an extended owner absence would affect approximately 40% to 55% of monthly revenue in a partial-disruption scenario — the delegation infrastructure built in this plan is the primary mitigation.
Seasonal revenue variance exceeds cash flow capacity	Financial	Medium	High	Month-over-month revenue decline >15% from $216,500 baseline in any single month	Activate targeted Care Plan enrollment push (members pay annually — creates cash inflow). Launch seasonal promotion campaign to existing customer base 45 days before anticipated trough. Review credit facility availability before trough month.
Key technician departure in competitive labor market	People	Medium	High	Technician requests reduced hours, raises compensation concerns, or peers report competing employment offers being discussed	Begin cross-training documentation in month 2: every job type has a written process that any qualified tech can execute. Maintain a passive outreach presence to two qualified technician candidates at all times.

Risk	Category	Probability	Impact	Warning Sign	Contingency
Price book update triggers meaningful customer objection volume	Revenue	**Low**	**Medium**	>10% of quote rejections in the 30 days post-update explicitly cite price as the primary stated reason, compared to the pre-update baseline	Isolate the repriced service categories; track close rate before and after by service type. If close rate drops >8pp on a specific service category, roll back that category's pricing and investigate before reapplying.

ORGANIZATIONAL RISK

Owner Dependency Is the Binding Scaling Constraint

Ironleaf operates as an owner-centric business: pricing exceptions, dispatch escalations, hiring decisions, and major customer issues route through the owner at 60+ hours/week. This is the single factor most likely to prevent Priority 1, 2, and 3 from sustaining beyond 90 days. Without delegation infrastructure — a written authority matrix, documented processes for recurring decisions, and a designated operational lead for day-to-day issues — each priority improvement will erode as the owner's attention shifts.

WHAT ONLY YOU CAN DO RIGHT NOW

1. A lead dispatcher or office manager with documented authority to approve pricing within a defined range
2. A written escalation protocol for service calls and customer complaints that does not require owner involvement
3. A weekly team meeting cadence with the KPI scorecard reviewed by the team — not just the owner

FIRST PRIORITY: DELEGATE OR HIRE

Elevate the current office manager or most senior dispatcher to a Lead Operations role with defined authority for pricing decisions up to $150 below quote and all scheduling decisions without owner approval. This role does not require a new hire — it requires documented authority and owner commitment to not override the decisions made within that authority range.

REVENUE AT RISK DURING AN EXTENDED OWNER ABSENCE

Illustrative 60-day partial-disruption scenario: $216,500/month revenue base with 40% to 55% of operations affected for 2 months = $173,000 to $238,000 of revenue at risk. Delegation infrastructure built in this plan is the primary mitigation. Investment required: hours, not dollars. (Illustrative estimate — fictional inputs.)

Competitor Landscape

Gulf Coast Comfort HVAC (Fictional Demo) *Fictional demonstration profile*	**+ Larger fleet with faster dispatch response times; strong commercial maintenance contracts**	**- Limited plumbing capability — residential dual-trade accounts require a second vendor relationship**
Bayshore Plumbing Services (Fictional Demo) *Fictional demonstration profile*	**+ Deep plumbing specialization; competitive on complex residential repiping and new construction**	**- No HVAC capability — customers with dual-trade needs must use a separate contractor**
SunBelt Home Services (Fictional Demo) *Fictional demonstration profile*	**+ National brand presence with online booking and digital-first customer experience**	**- Demonstration weakness: a more standardized service model with less relationship continuity than Ironleaf's locally established customer base; higher-price-point franchise model in this fictional demonstration scenario**

OUR COMPETITIVE ADVANTAGE

Ironleaf's dual-trade capability (plumbing + HVAC) combined with an established referral network and 52% repeat rate creates a customer relationship advantage that single-trade competitors cannot match. Long-tenure customers who trust Ironleaf for both service categories are significantly harder to displace than transactional single-service relationships.

WHERE WE ARE WEAKER

In this fictional demonstration scenario: online booking capability and digital customer experience lags the national brand competitor modeled in this analysis. Price book updates and systematic follow-up processes are underdeveloped relative to the franchised competitor modeled here, which benefits from a corporate operations playbook in this scenario. These are illustrative competitive weaknesses — not verified market research.

PRICING POSITION

Mid-market — positioned between the lowest-cost independents and the premium franchise brands. Current pricing has not been updated in 2+ years, creating a gradual drift toward the lower-cost end of the mid-market range that the Priority 2 price book update addresses.

PERFORMANCE TRACKING

Master KPI Scorecard

Review these weekly. The goal is not perfection — it is direction. A metric moving toward target means your actions are working.

Metric	Now	30 days	90 days	How to Measure	Frequency
Estimate close rate	42%	46%	52%	Closes from estimates ÷ estimates written (tracked weekly)	Weekly
Average job value	$1,273	$1,300	$1,350	Total monthly revenue ÷ total jobs invoiced	Monthly
Blended gross margin	38%	38.5%	40%	(Revenue - Parts - Direct Labor) / Revenue from monthly invoicing report	Monthly
Active Care Plan memberships	36	36	90	Active membership agreements in CRM or membership log	Weekly
Owner hours per week	60 hours (est.)	55 hours	48 hours	Self-reported weekly time log maintained by owner	Weekly
Tech dispatch utilization	72%	74%	78%	Billable job hours logged ÷ available tech hours (7 techs × 8h × workdays)	Weekly

DO THIS TODAY — UNDER 30 MINUTES

Pull every open estimate written in the last 30 days that has not received a follow-up call in 7+ days. Call each one today using this opener: 'Hi [Name], this is [Owner] from Ironleaf — I wanted to follow up on the estimate we sent and make sure you didn't have any questions before making a decision.' Track who answers and who confirms. This single action, repeated daily for two weeks, is the fastest test of whether structured follow-up improves your close rate.

ALSO ON OUR RADAR

This 90-day plan focuses on revenue recovery and margin improvement within the existing operation. It does not address: geographic service area expansion, commercial or new construction market entry, fleet replacement planning, or CRM platform selection. These are valid growth avenues that require a stable operational foundation — both delegation infrastructure and margin improvement — which should be outcomes of this plan before those initiatives begin.

WEEK 4 CHECK-IN QUESTIONS

1. How many estimates did you write this week, and how many follow-up calls did you complete on open estimates from the past 30 days?

2. What was your close rate on estimates where you made at least 3 contacts, compared to estimates where you made only 1 call?

3. Have you audited the price book for your 3 highest-volume service types? If yes, what was the most surprising pricing gap you found?

FROM YOUR ZERODELAY

FICTIONAL DEMONSTRATION REPORT | Ironleaf Plumbing & Air is a fictional business created for illustrative purposes. All company, financial, operational, competitor, and market data in this sample are fictional and are not associated with a real customer. This report demonstrates the structure and depth of ZeroDelay's analytical framework.

About this demonstration report: Ironleaf Plumbing & Air is a fictional business created solely to illustrate the structure and analytical depth of a ZeroDelay 90-Day Plan. All company, financial, operational, and competitor data in this report are illustrative. No real diagnostic data, web research, AI generation, or customer information was used. This sample was produced from a static fixture using the ZeroDelay report renderer.